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10 January 1961

MEMORANDUM FOR:

SUBJECT : 1961 Clandestine Services Records Inventory

1. Two previous inventories of CS paper holdings have resulted in broad totals which indicate only where the greatest accumulations of paper exist. In order to take any action from these data, we would have to do a comparative study, return to those units appearing to be out of line, and go through their records all over again. Various CS units, however, have taken intensive and detailed inventories on their own, considered the actual utility of each file series with the custodian on the spot and, in every case, have been able to reduce their paper holdings substantially by either retirement or destruction. Looking forward to moving into the new building, these units are in excellent shape and will not be in the position of moving extraneous safes and files which will complicate life at that time.

2. We, in the DDP/RMO staff, are now attempting to combine the natural impetus of the forthcoming move with our own interest in cleaning up the CS files, obtaining some accurate and comprehensive records data, and preparing proper Records Control Schedules to keep us in shape hereafter. To this end, we ask your cooperation in taking an inventory of your paper holdings with the forms and in the manner prescribed in attachment.

3. Being the first really intensive look at the records of most units, this inventory must be taken by unit personnel with a minimum of outside help. It is strongly recommended that a two-man team (or teams) be constituted consisting of the RMO or one officer who knows something about records, records schedules, etc., and one secretary or notetaker to accompany him. This team should then proceed through the unit, discussing each file series with the holder or custodian making recommendations on the spot. The secretary will fill in the forms and make appropriate notes leading to later preparation of written recommendations and schedules for the particular unit surveyed. This office, of course, is prepared to offer any appropriate assistance in the shape of forms, advice or personnel.

[redacted]
DD/P Records Management Officer

25X1

Attachment:
As stated

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INSTRUCTION SHEETS AND FORMS TO BE USED IN 1961

CLANDESTINE SERVICES RECORDS INVENTORY

Tab 1 - Instructions for Using Form 1 - CS Recapitulation Sheet

Tab 2 - Instructions for Using Form 2 - CS Inventory Work Sheet

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C O N F I D E N T I A L

INSTRUCTION SHEETS
CLANDESTINE SERVICES RECORDS INVENTORY - 1961

In order to arrive at any acceptable standards of records keeping in the diffuse and varied Clandestine Services, we must observe the inter-play of three factors, namely: the numbers of people, the functions they perform, and the records they actually keep and use. If properly collected and analyzed, such data will enable us to: (1) set up efficiently in the new building, (2) prepare Records Control Schedules based on demonstrated need which will keep us within bounds, and (3) understand and describe our records capacities and limitations in order to facilitate executive decision relative to our internal effectiveness, our mission and our service. Thus, we are interested in much more than the simple and obvious corollary objectives of eliminating useless accumulated paper and promoting records consciousness and good housekeeping. Those who take this inventory can assist immeasurably by keeping this view in mind and making appropriate comments as they occur.

****

Records inventories produce results, so to speak, on two levels: (1) recognition of an existing records problem and immediate action at the time the inventory is taken and (2) after all results are in, analysis, comparison of the types and quantities of holdings by units engaged in similar duties, and the drawing of averages, will produce standards which can be applied by executive means. In order to service these two objectives, it is necessary that inventories be taken and totaled and immediate recommendations prepared in memorandum form for one unit at a time at the lowest command levels: branch, area desk, or staff section. This will not only produce pertinent recommendations while they are fresh in the mind, it will permit proper comparison of units at all levels at a later date.

The attached forms have been designed specifically for CS Records Inventory use and will reflect practically every type of record known to exist in the CS. If, however, a file series does not fit the form, simply describe it under COMMENT. All queries, problems and requests for assistance should be referred to [redacted] 25X1

Attachments:
Tab 1 - Instructions for Using Form 1 - CS Recapitulation Sheet
Tab 2 - Instructions for Using Form 2 - CS Inventory Work Sheet

C O N F I D E N T I A L

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Tab 1

INSTRUCTIONS FOR USING FORM 1 - CS RECAPITULATION SHEET

Use one form for each Unit and another for successive organizational breakdowns in order to permit later comparison of one Unit or Section to another engaging in a similar function such as one Reports Unit to another or all Reports Units together. The first step is to interview the Unit Chief to obtain the general data at the top of the form. Show normal on-board strength of the Unit excluding "casuals". The last step in the inventory will be to fill in the linear totals and prepare a memorandum report for the Unit Chief, advising him of his totals and making any immediate and obvious recommendations for destruction, purging, retirement or consolidation of records which have become apparent.

Attachment:
Form 1 - CS Recapitulation Sheet

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SECRET
(When filled in) Date:

CLANDESTINE SERVICES RECORDS INVENTORY RECAPITULATION SHEET

Unit:	Room No.:	Personnel: _____ Officers _____ Clerical

Organizational Breakdown & Function:

CLASS & CATEGORY OF RECORDS	TYPE OF FILE	LINEAR FEET	TOTAL
OFFICIAL CS FILES	Projects		
Operational	201s		
	Subjects		
NON-RECORD AUXILIARY FILES	Cards		
Operational	Chronos		
	Personalities		
	Subjects		
Reports	Cards		
	Chronos		
	Personalities		
	Subjects		
CE/CI	Cards		
	Chronos		
	Personalities		
	Subjects		
Operational Support	Support Project Data		
	Subjects (Reference, Briefing, etc.)		
	Staff Studies, Memos, Correspondence		
Administrative and Managerial	Book Dispatches and Policy Paper		
	Cards		
	Chronos		
	Subjects		
MISCELLANEOUS CLASSIFIED ITEMS	Forms and Maps		
	Issuances, Regs, HBs, etc.		
	Overnight Storage		
Grand Total			

SECRET
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Tab 2

INSTRUCTIONS FOR USING FORM 2 - CS INVENTORY WORK SHEET

Use one form for each readily identifiable file series or other logical grouping of files. This would normally mean that a new form would be used for each change in either Type or Category as shown on the check-off section of the form itself.

****

Unit, Room No., Safe No. -- Fill in completely on each sheet in order to permit ready identification and access to the record in question at a later date. Insert "vault" when appropriate.

Footage to Nearest ½ Foot -- Note that one safe drawer holds two feet. This minimum measurement is thus ¼ of a drawer. Lesser quantities usually comprise a miscellany which fits none of our categories and may be safely ignored. Use common sense and enter lesser measurements only as it appears to be appropriate and necessary.

Type and Category -- In this section we are interested in total footage, thus, a simple check mark to combine with your measurement will suffice.

Comment -- This is, of course, the most important factor involved in conducting the survey, in that the description must permit later judgment to be applied. Although many comments may prove to be extraneous, if we are taking the trouble to look at a file series we might just as well take the opportunity to thoroughly describe and comment. With respect to most of the types and categories shown on the form, the data we require is apparent. The following instructions are intended to clarify only those items where confusion may exist. Please be alert to the factor of duplication. There is no way in which this can be readily indicated other than through your description. If, for example, you note the same Chrono file being maintained at Desk, Branch and Staff levels, please so indicate. Furthermore, if CS record copies appear in other than official CS files, this too should be noted.

Auxiliary (non-CS) Files -- Two check marks are necessary to provide a complete descriptive title for the file, thus: operational-subjects, or reports-chronos, or CE/CI-personalities.

Chronos -- Indicate the type and whether it is a cable, dispatch or memoranda chrono, the dates covered, and the point of origin or symbols as appropriate.

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Personalities -- Indicate the use and method of filing, i.e., whether alphabetical, numerical or some other fashion.

Subjects -- Provide as complete a description as possible of the subjects covered, the purpose of the file, and the use to which it is put. If it is possible to obtain a list of the files readily, please do so.

Policy -- This category is included to cover the working files held by most Unit Chiefs, often characterized as Administrative but usually containing more of a miscellany of informal, sensitive, operational and so forth, paper.

Cards -- The linear feet of cards, either 3"x5" or 5"x8", is readily estimated by counting the number of full card trays and multiplying by either two feet or one and one-half feet since all card trays in CS card safes correspond to one or the other of these measurements. The average IBM drawer contains four linear feet of cards and the average Kardex safe cabinet should be estimated at one linear foot. In all cases, estimate trays to nearest ½ foot. We are not interested in miscellaneous boxes of cards whether classified or not.

Operational Support Material -- Much Staff paper will be included in this category. It is intended to cover such things as research paper, operational intelligence, development of technical equipment, studies and projects of various kinds having an indirect or diffuse bearing upon area division operations. Target studies, for instance, normally broad in their application, would be characterized as operational support material.

Admin -- Indicate whether Admin files pertain to finance, logistic or personnel matters, or simply state the type of mixture if this is the case.

Action Recommendation -- Your comment in this space depends upon a number of factors, the most important being the type or category of file. Regardless of this, however, please bear in mind that we are trying to:

(1) Eliminate any and all paper that is seldom used by recommending that it be retired or destroyed and

(2) Establish a rational system for the periodic retirement of paper which is now useful but which will inevitably become dated.

Our first objective is best served by spotting those files or parts of files, regardless of type, which are not active and recommending "Retire or Destroy". If the custodian will concur on the spot, so much the better.

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The second objective will be served if the persons taking the inventory will query the custodian on the actual use of the file relative to its bulk and apparent purpose, enabling us later to prepare schedules based on reality.

It should be noted finally, for the information of all concerned, that we are engaged in an educational but not an arbitrary process. All destruction, retirement and scheduled retirement will take the form of recommendations to the Unit Chief.

Attachment:
Form 2 - CS Inventory Work Sheet

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SECRET Date of Survey:

(When filled in)

CLANDESTINE SERVICES RECORDS INVENTORY WORK SHEET

Unit:	Room No.:	Safe No.:	Footage to Nearest ½ Foot:

TYPE & CATEGORY: (check appropriate descriptions)

1. OFFICIAL CS FILES ☐: Projects ☐ 201s ☐ Subjects ☐ Mixed ☐

2. AUXILIARY FILES ☐: a. Operational ☐ Reports ☐ CE/CI ☐ Admin ☐ Policy ☐
b. Chrono ☐ Personality ☐ Subject ☐

3. CARDS ☐ 3x5 ☐ 5x8 ☐ : Index ☐ Source/Substantive ☐ Mixed ☐ Abstracts ☐

4. OPS SUPPORT MATERIAL ☐: Projects ☐ Subjects ☐ Studies, Memos, Correspondence ☐

5. CLASSIFIED STORAGE ☐: Forms ☐ Maps ☐ CS Regs ☐ Overnight ☐ Printed Reference Material ☐

COMMENT: (As appropriate, give name or description, use and filing method. Especially applicable to all Subject file series.)

ACTION RECOMMENDATION: None ☐ Schedule Retirement ☐ Destroy ☐ Needs Study ☐

Explain:

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